

Date: November 3, 2008

Alert Number: 0006

To: Providers, Managed Care Organizations

Re: Portal Administrators and Clerk Administrators May Begin Assigning Roles to Clerks and Clerk Administrators

ForwardHealth Portal administrators and clerk administrators for providers, managed care organizations, and trading partners may now begin assigning roles to clerk administrators and clerks that have been created on their Portal account. Portal administrators may also continue to create new clerk administrators and clerks on their Portal account and may assign roles to any new clerk administrators and clerks they add. Clerks may be assigned one or many roles (e.g., claims, prior authorization, enrollment verification).

To assign roles to an existing clerk:

1. Go to www.forwardhealth.wi.gov/.
2. Login to the site as an administrator.
3. Click the "Account" menu.
4. Click the "Clerk Maintenance" link.
5. Select the clerk you would like to assign roles to by highlighting the clerk in the list — or — use the "Search" function to find the clerk.
6. In the "Clerk Roles" section of the screen, click the role you wish to assign to the clerk and use the arrows to move the role from the "Available Roles" box on the left to the "Assigned Roles" box on the right. You can continue to do this for as many roles as necessary.
7. Click the "Submit" button at the bottom of the page when you are done. You will get a "Save was Successful" message at the top of the screen.
8. Repeat for all clerks.

To create a clerk and assign roles:

1. Go to www.forwardhealth.wi.gov/.
2. Login to the site as an administrator.
3. Click the "Account" menu.
4. Click the "Clerk Maintenance" link.
5. Enter the clerk information at the top of the screen.
6. In the "Clerk Roles" section of the screen, click the role you wish to assign to the clerk and use the arrows to move the role from the "Available Roles" box on the left to the "Assigned Roles" box on the right. You can continue to do this for as many roles as necessary.

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7. Click the “Submit” button at the bottom of the page when you are done. You will get a “Save was Successful” message at the top of the screen.
8. Repeat for all clerks you wish to add.

As a reminder, Portal administrators are responsible for requesting, creating, and managing accounts and all users established for their accounts. For more information about the responsibilities of the Portal administrator, refer to the August 2008 *ForwardHealth Update* (2008-156), titled “Important Information for ForwardHealth Portal Administrators.”